



Swindon Transition Counsel



Transition your business
on your own terms.
Control the process.
Improve your odds of success.

SWINDON TRANSITION COUNSEL

Swindon roundabout in Wiltshire, England is a complex intersection where six roadways converge. Like the loops of the Swindon roundabout, transitioning your business can be complex, time consuming and full of risk. The Swindon Transition Counsel is a service that helps business owners who are seeking an orderly, financially sound and tax-efficient transition of the ownership, control and/or management of their business.

WHY CONSIDER A TRANSITION PLAN?

Studies show that three out of four business owners who transition their business are not satisfied with the results. At Oxford Financial Group, Ltd., we are dedicated to creating positive outcomes for the business owner.

Do you want to transition your business in the next three to ten years?
Have you thought about what would happen to your business if you unexpectedly needed to transition it today?

Swindon Transition Counsel helps you transition your business successfully, on your own terms.



PROVEN, SYSTEMATIC AND OBJECTIVE APPROACH

You have a business to run and may not have time to devote to managing your transition process or team of advisors. That is where Oxford comes in. We have helped many business owners like you transition their business. We work with you to develop a transition plan, keep it on track, create accountability among your advisor team and establish timelines to ensure your transition happens when you want it to. Swindon Transition Counsel is a proven, systematic and structured approach that ensures progress toward your goals.

HOW WE BEGIN

Our first step is to understand your current state, including your timeline, whom you want to transition your business to and how much you want from the transition of your business. We then help you develop a detailed strategic plan that brings together your business, financial and personal goals.

A POSITIVE OUTCOME THAT YOU CONTROL

Swindon Transition Counsel helps you understand your options and set your goals to enhance your satisfaction post-transition. We help you identify ways to drive up the value of your business and close the gap between what you have and what you want.

Finally, we help you develop a life-after-business plan, to help you prepare for the next chapter of your life.



***“The goal of Oxford’s
Swindon Transition Counsel
is to help owners successfully navigate
what is often the single most important
financial event of their life -
the transition of their business.”***

***– Lorelei Tolson, CPA/PFS, CFP®, CIMA®, CEPA, CExP™
Managing Director, Oxford Financial Group, Ltd.***

